

WHAT IS CLAIMED IS:

1. A process for generating reports related to new business production at a plurality of production sources located geographically apart from each other, the process comprising the steps of:

receiving a request to generate at least one report related to new business  
5 production for at least one of the plurality of production sources;

receiving at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines a portion of the information to be contained within the at least one report, and where the information has been received from the plurality of production sources;

10 processing the at least one selection parameter, where the processing includes obtaining the portion of the information and formatting the at least one report; and

generating the at least one report based on the processed selection parameters.

2. The process according to claim 1, wherein the new business production relates to new business production of insurance products.

15 3. The process according to claim 2, where the plurality of production sources comprise at least one of:

- a) an insurance agent;
- b) an insurance agency;
- c) a financial service agent; and
- 20 d) a financial service agency.

4. The process according to claim 1, wherein the step of formatting the at least one report further comprises arranging contents of the report into an appropriate presentation format.

5. The process according to claim 1, wherein the step of processing further comprises converting the report into one or more application formats for viewing.

6. The process according to claim 1, where the information received from the plurality of production sources relates to a plurality of insurance products and where information about at least one of the plurality of insurance products includes information in a different format than information about at least one other of the plurality of insurance products.

7. The process according to claim 6, where the report contains information related to the plurality of insurance products.

8. The process according to claim 7, where the report further contains information related to the plurality of productions sources.

9. The process according to claim 8, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

10. The process according to claim 7, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

11. The process according to claim 6, where the report further contains information related to the plurality of productions sources.

12. The process according to claim 11, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

13. The process according to claim 1, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

14. The process according to claim 13, where the report contains information related to the plurality of insurance products.

15. The process according to claim 14, where the report further contains information related to the plurality of productions sources.

16. The process according to claim 13, where the report further contains information related to the plurality of productions sources.

17. A process for generating reports related to new business production of insurance products at a plurality of production sources located geographically apart from each other, the process comprising the steps of:

receiving a request to generate at least one report related to new business production for at least one of the plurality of production sources;

receiving at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines a portion of the information to be contained within the at least one report, and where the information has been received from the plurality of production sources;

processing the at least one selection parameter, where processing includes:

- a) obtaining the portion of the information;
- b) formatting the at least one report, including arranging contents of the report into an appropriate presentation format; and
- c) converting the report into one or more application formats for  
5 viewing; and

generating the at least one report based on the processed selection parameters.

18. The process according to claim 17, where the plurality of production sources comprise at least one of:

- a) an insurance agent;
- 10 b) an insurance agency;
- c) a financial service agent; and
- d) a financial service agency.

19. A system for generating reports related to new business production at a plurality of production sources located geographically apart from each other, the  
15 system comprising:

means for receiving a request to generate at least one report related to new business production for at least one of the plurality of production sources;

means for receiving at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines a portion of the  
20 information to be contained within the at least one report, and where the information has been received from the plurality of production sources;

means for processing the at least one selection parameter, where the processing includes obtaining the portion of the information and formatting the at least one report; and

means for generating the at least one report based on the processed selection  
5 parameters.

20. The system according to claim 19, wherein the new business production relates to new business production of insurance products.

21. The system according to claim 20, where the plurality of production sources comprise at least one of:

- 10
- a) an insurance agent;
  - b) an insurance agency;
  - c) a financial service agent; and
  - d) a financial service agency.

22. The system according to claim 19, wherein formatting the at least one  
15 report further comprises arranging contents of the report into an appropriate presentation format.

23. The system according to claim 19, wherein the step of processing further comprises means for converting the report into one or more application formats for viewing.

20 24. The system according to claim 19, where the information received from the plurality of production sources relates to a plurality of insurance products and where information about at least one of the plurality of insurance products includes information in a different format than information about at least one other of the plurality of insurance products.

25. The system according to claim 24, where the report contains information related to the plurality of insurance products.

26. The system according to claim 25, where the report further contains information related to the plurality of productions sources.

27. The system according to claim 26, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

28. The system according to claim 25, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

29. The system according to claim 24, where the report further contains information related to the plurality of productions sources.

30. The system according to claim 29, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

31. The system according to claim 19, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

32. The system according to claim 31, where the report contains information related to the plurality of insurance products.

33. The system according to claim 32, where the report further contains information related to the plurality of productions sources.

5 34. The system according to claim 31, where the report further contains information related to the plurality of productions sources.

35. A system for generating reports related to new business production of insurance products at a plurality of production sources located geographically apart from each other, the system comprising:

10 means for receiving a request to generate at least one report related to new business production for at least one of the plurality of production sources;

means for receiving at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines a portion of the information to be contained within the at least one report, and where the information  
15 has been received from the plurality of production sources;

means for processing the at least one selection parameter, where processing includes:

- a) obtaining the portion of the information;
- b) formatting the at least one report, including arranging contents  
20 of the report into an appropriate presentation format; and
- c) converting the report into one or more application formats for viewing; and

means for generating the at least one report based on the processed selection parameters.

36. The system according to claim 35, where the plurality of production sources comprise at least one of:

- a) an insurance agent;
- b) an insurance agency;
- 5 c) a financial service agent; and
- d) a financial service agency.

37. A medium storing code for causing a processor to process generate reports related to new business production at a plurality of production sources located geographically apart from each other, the medium comprising:

10 code for causing a processor to receive a request to generate at least one report related to new business production for at least one of the plurality of production sources;

code for causing a processor to receive at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines  
15 a portion of the information to be contained within the at least one report, and where the information has been received from the plurality of production sources;

code for causing a processor to process the at least one selection parameter, where the processing includes obtaining the portion of the information and formatting the at least one report; and

20 code for causing a processor to generate the at least one report based on the processed selection parameters.

38. The medium according to claim 37, wherein the new business production relates to new business production of insurance products.



39. The medium according to claim 38, where the plurality of production sources comprise at least one of:

- a) an insurance agent;
- b) an insurance agency;
- 5 c) a financial service agent; and
- d) a financial service agency.

40. The medium according to claim 37, wherein the step of formatting the at least one report further comprises arranging contents of the report into an appropriate presentation format.

10 41. The medium according to claim 37, wherein the step of processing further comprises the converting the report into one or more application formats for viewing.

42. The medium according to claim 37, where the information received from the plurality of production sources relates to a plurality of insurance products and where information about at least one of the plurality of insurance products includes information in a different format than information about at least one other of the plurality of insurance products.

15 43. The medium according to claim 42, where the report contains information related to the plurality of insurance products.

20 44. The medium according to claim 43, where the report further contains information related to the plurality of productions sources.

45. The medium according to claim 44, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes

information in a different format than information about at least one other of the plurality of production sources.

46. The medium according to claim 43, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

47. The medium according to claim 43, where the report further contains information related to the plurality of productions sources.

48. The medium according to claim 47, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

49. The medium according to claim 37, wherein the information received from the plurality of production sources relates is about the production sources and where information about at least one of the plurality of production sources includes information in a different format than information about at least one other of the plurality of production sources.

50. The medium according to claim 49, where the report contains information related to the plurality of insurance products.

51. The medium according to claim 50, where the report further contains information related to the plurality of productions sources.

52. The medium according to claim 49, where the report further contains information related to the plurality of productions sources.

53. A medium storing code for causing a processor to generate reports related to new business production of insurance products at a plurality of production sources located geographically apart from each other, the medium comprising:

code for causing a processor to receive a request to generate at least one report  
5 related to new business production for at least one of the plurality of production sources;

code for causing a processor to receive at least one selection parameter related to the at least one requested report, where the at least one selection parameter defines a portion of the information to be contained within the at least one report, and where  
10 the information has been received from the plurality of production sources;

code for causing a processor to process the at least one selection parameter, where processing includes:

- a) obtaining the portion of the information;
- b) formatting the at least one report, including arranging contents  
15 of the report into an appropriate presentation format; and
- c) converting the report into one or more application formats for viewing; and

code for causing a processor to generate the at least one report based on the processed selection parameters.

20 54. The medium according to claim 53, where the plurality of production sources comprise at least one of:

- a) an insurance agent;
- b) an insurance agency;
- c) a financial service agent; and

- d) a financial service agency.

POST-TESTED